Group Types

Use group types to view client data in the aggregate. By default, Addepar comes with a single built-in group type called Groups.

Base route	/v1/group_types
Endpoints	**GET** /v1/group_types/ /v1/group_types/:id **POST** /v1/group_types **PATCH** /v1/group_types/:id **DELETE** /v1/group_types/:id
Produce	JSON
Pagination	No
Permissions required	"API Access: Create, edit, and delete" "Groups: Manage selected or all groups access" allows you to retrieve group types. "Manage firm settings: Custom group types." is required to create, update, or delete group types.
OAuth Scopes	`GROUPS` or `GROUPS_WRITE`

Resource overview

Group types are described by the below resource object attributes.

ATTRIBUTE	DESCRIPTION	EXAMPLE
`group_type_key`	The ID of the group type. String.	`"GROUPS"`
`display_name`	The user-facing name used to label the group type. String.	`"SPECIAL GROUPS"`
`is_permissioned_resource`	If `true`, users will need access to groups of this type. This is referred to as "Explicit access" in Addepar. If `false`, users will need to have access to each individual member of a group to access groups of this type. This is referred to as "Implicit access" in Addepar. Multiple.	`true`

Default Group Type

By default, firms have one group type, `GROUPS`, that is a permissioned resource. The default group type cannot be changed or deleted.

Example:

RESPONSE

```
{
  "data": {
    "id": "GROUPS",
    "type": "group_types",
    "attributes": {
      "is_permissioned_resource": true,
      "group_type_key": "GROUPS",
      "display_name": "GROUPS"
    },
    "links": {
      "self": "/v1/group_types/GROUPS"
    }
  },
  "included": []
}
```

Get All Group Types

Retrieve all group types for the firm.

GET `/v1/group_types/`

REQUEST   RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/group_types/
```

Optional Query Parameters

PARAMETER	DESCRIPTION	
`is_permissioned_resource`	If `true`, users will need access to groups of this type. This is referred to as "Explicit access" in Addepar. If `false`, users will need to have access to each individual member of a group to access groups of this type. This is referred to as "Implicit access" in Addepar. Multiple.	`is_permissioned_resource=true`

Response Codes:

- `200 OK` : Success. Returns JSON with all group types.
- `400 Bad Request` : Incorrect API format

Get a Group Type By ID

Retrieve a group type using a group type key (same as ID).

GET `/v1/group_types/:id`

REQUEST   RESPONSE

```
GET https://examplefirm.addepar.com/api/v1/group_types/HH_GROUPS
```

Response Codes:

- `200 OK` : Success. Returns JSON with the group type.
- `400 Bad Request` : Incorrect API format
- `404 Not Found` : Group type key not found

Create a Group Type

Create a new group type for your firm.

POST `/v1/group_types`

REQUEST   RESPONSE

```
POST https://examplefirm.addepar.com/api/v1/group_types

{
  "data": {
    "type": "group_types",
    "attributes": {
      "is_permissioned_resource": false,
      "group_type_key": "HH_GROUPS",
      "display_name": "Households"
    }
  }
}
```

Response Codes:

- `201 OK` : Success. Returns JSON with recently created group type.
- `400 Bad Request` : Incorrect API format or missing parameters
- `403 Forbidden` : Lacking admin permission
- `409 Conflict` : Group type key already exists within the firm

Update a Group Type by ID

Change an existing group type's display name using the group type key (same as ID).

PATCH `/v1/group_types/:id`

Example:

REQUEST   RESPONSE

```
PATCH https://examplefirm.addepar.com/api/v1/group_types/HH_GROUPS

{
  "data": {
    "id": "HH_GROUPS",
    "type": "group_types",
    "attributes": {
      "display_name": "Household groups"
    }
  }
}
```

Response Codes:

- `200 OK` : Success. Returns JSON with updated group type.
- `400 Bad Request` : Incorrect API format or missing parameters
- `403 Forbidden` : Lacking admin permission
- `404 Not Found` : Group type key not found

Delete a Group Type

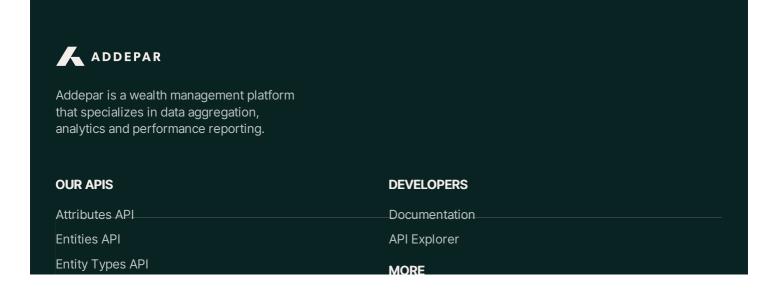Delete the group type using the group type key (same as ID).

DELETE `/v1/group_types/:id`

REQUEST   RESPONSE

```
DELETE https://examplefirm.addepar.com/api/v1/group_types/HH_GROUPS
```

Response Codes:

- `204 No Content` : Successfully deleted the group
- `400 Bad Request` : Incorrect API format or missing parameters
- `403 Forbidden` : Lacking admin permission
  * `404 Not Found` : Group type key not found

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